

Please follow these four steps to help you quickly and easily donate your Gift of Publicly Traded Securities to Sinai Health Foundation.

1. Complete the **“Letter of Authorization from Donor to Broker”** form (below), which will help your broker initiate the electronic transfer of securities. If you have any questions about completing the form, please call 416-305-1434 or email carla.silva@sinaihealthfoundation.ca.
2. Send the completed transfer form to your broker or investment advisor who will initiate and be responsible for the transfer.
 - a. If donating a mutual fund, please ask your financial institution to complete a Power of Attorney to authorize the re-registration of mutual fund units being donated. Send the Power of Attorney document along with this donation form to Team.Kruzich@RichardsonWealth.com.
3. Please notify the Foundation by emailing a copy of the completed form to the Foundation c/o Carla Silva at carla.silva@sinaihealthfoundation.ca. This will help us to ensure that the transfer is received by our broker and that we are able to issue your donation receipt and provide appropriate recognition for your generous donation.
4. You will be issued a donation receipt based on the closing price on the date when the shares are transferred to the Foundation’s account at our custodial agent, Richardson Wealth.

(Note: shares are considered legally transferred only when delivery is confirmed by our custodial agent.) It is the Foundation’s policy that all shares be sold as soon as possible after they have been received.



Thank you for considering a gift of securities to Sinai Health Foundation. Making a gift of publicly traded securities is a simple, easy process and a wonderful way to support Sinai Health.

In order for stocks to be legally transferred and accepted by Sinai Health Foundation and our brokerage firm, a completed and signed copy of this form must be forwarded to the contacts listed below.

You will receive a donation receipt based on the full fair market value of the shares for the close of market on the day the securities are received by the Foundation, in accordance with our Board Policy and Revenue Canada Regulations.

Sinai Health Foundation

Attn: **Carla Silva**, Director, Finance
1001-522 University Avenue
Toronto, Ontario M5G 1W7

T: 416-305-1434

carla.silva@sinaihealthfoundation.ca

Donor Information

First Name _____ Last Name _____

Mailing Address _____

City _____ Province _____ Postal Code _____

Phone _____ Email _____

Description of Securities - Equities/Mutal Funds/Bonds

This letter will confirm my intention to donate the following securities to Sinai Health Foundation:

Security Description _____ Qty. _____ Approx. Value (\$) _____

Security Description _____ Qty. _____ Approx. Value (\$) _____

Broker/Delivering Custodian Information

Firm Name _____ FINS# _____ Fax _____

Name of Broker _____

Broker Email _____ Phone _____

Account Name _____ Client Account Number _____

Gift of Designation

- Highest Priority Needs of Sinai Health Foundation (default); or
- Specific Designation _____

Donor Authorization

Signature _____

*Please check with your broker to ensure electronic signatures are accepted.

Dated the _____ (day) of _____ (month), _____ (year).

Transfer Contact

Transfer to: Richardson Wealth (FINS-22; CUID-FIDC;
DTC-5040) for Sinai Health Foundation,
Account #H1A-EG00-A (CAD) and H1A-EG00-B (USD)

Richardson Wealth

Attn: Joel Kruzich

T: 416-572-5472

F: 416-864-9888

team.kruzich@richardsonwealth.com